# PACKAGING

THE CAHNERS MAGAZINE FOR DECISION-MAKERS/APRIL 1992

EXCLUSIVE:
GOING
GLOBAL

World Packaging Pros
Talk Trends, Offer Tips

Cover Story:

Co-Packer Becomes
Pouch Master

See how the Windex gets in there

Earth Day Special:

Will America Settle
For Less Packaging?

PLUS—

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This package contains over 20% recycled plastic
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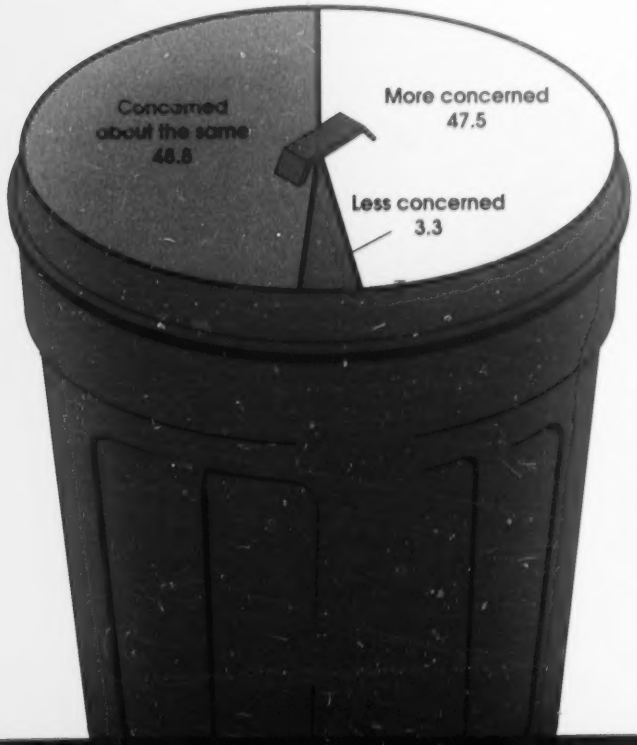
FL. OZ. (1 PT. 2 OZ.) 532ml

# PACKAGING

A CAHNERS PUBLICATION
VOLUME 37 NUMBER 5

**Multicomponent packages** for cake frostings provide convenience for people who do their own baking. Page **15**

**Do Americans** really want less packaging? Part I of our exclusive Consumer Survey reveals "probably not." Page **42**

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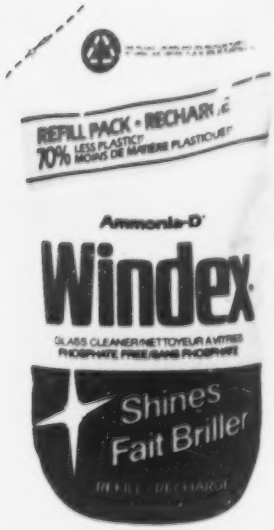


## NEXT MONTH

**Flexible packaging today:** New flexible packages make convenient containers, while winning points for source reduction. We give guidelines on matching materials and machines.

**Who will do your R&D?** If your packaging R&D budget was a victim of the recession, consultants, research firms and suppliers can help fill the gap.

**Packaging Line Planning Guide.** In our third annual guide, numerous case histories provide money-saving and timesaving lessons on planning and running packaging lines.

## COMING SOON

✔ The PACKAGING 100: Our exclusive report tells which materials the top 100 end-user companies are buying to package their products and why. Keep tabs on these trend-makers.

✔ Retailers want packages for cosmetics and personal-care products that help generate rapid stock rotations. Learn what you can do to make that happen in Part II of our series.

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## PACKAGING CONFIDENCE INDEX

# Outlook for new-product intros remains positive

Kermit Baker
Chief Economist
Cahners Economics

The PACKAGING Magazine Confidence Index dipped in March to 63.2, less than one point from the reading in February.

Although expectations in the consumer sector dropped recently, there is no evidence of overall economic backsliding among the nation's business managers. Respondents to our survey believe that better economic conditions lie immediately ahead, and they are confident enough of a recovery to take actions necessary to profit from improved business conditions. The packaging field itself has not lost confidence.

Expectations for research and development in the packaging industry were high through the second quarter of 1991 but began to wane at the end of the year. Expectations for this year have begun to rise again, with businesses feeling the strongest about future developments in the February survey.

A slight downturn was recorded in March but it may prove temporary. The outlook for product introductions remained positive through the first quarter of this year, supporting the continuing importance of research and development.

The construction industry is an industry on the move and any packaging business related to building should be picking up. The highest expectations in the construction industry are expressed by business operators in planned increases in production and inventories.

There has been solid evidence in recent weeks that businesses around the country are beginning to follow through on planned actions reported here in the past few months.

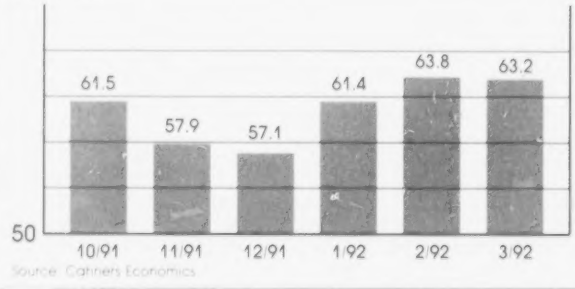
In February industrial production and capacity utilization bounced back. Perhaps most encouragingly as it relates to the depth and sustainability of the recovery, payroll employment surged by 164,000 during February. Average weekly hours and overtime hours jumped sharply.

The Packaging Confidence Index shows industry recovering the optimism it held in mid-1991 and poised for a broadly based recovery. However, the positive outlook we are seeing today is more firmly grounded in economic fundamentals than gains induced by the the post Gulf War-euphoria of last year. Unlike the false recovery in 1991, the current economic growth appears to be the "real thing"—a modest but sustainable recovery that will carry us through 1992 and into an even better 1993.

*Research assistance:*
*Lori Brassaw, Economist*
*Cahners Economics*

### INDEX REVEALS SENSE OF CAUTION

Respondents to the PACKAGING Business Confidence Index survey in March 1992 report a slight drop in confidence, perhaps reflecting a lack of willingness to take big chances just yet. Note: A number over 50 reflects more optimism than pessimism.




Source: Cahners Economics

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**Takes one man just 3 minutes to set up.**

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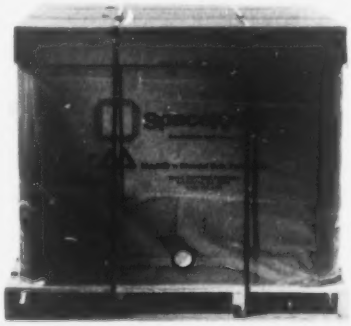

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For information circle 9

# ENVIRONMENTAL NEWS

## Readers Concerned About Cost Of Recycled Materials, Says Survey

A recently conducted poll of a random sampling of PACKAGING readers indicates many are concerned about the cost of using recycled materials. Despite the cost, more than a third feel compelled to use recycled materials for public relations reasons.

In response to another question, over 40% of readers expect their suppliers to take back their own containers when empty.

PACKAGING mailed questionnaires to a random sample of 2,000 readers. Nearly 200 replied. Recipients were given a list of statements related to environmental issues facing the packaging field and were asked to indicate to what extent they agreed or disagreed.

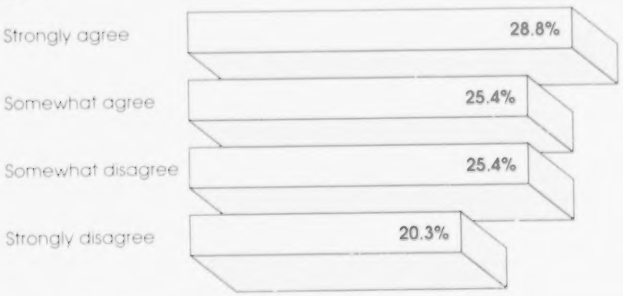
Slightly more than half of the readers who responded agreed with the statement, "I would be willing to use recyclable materials in my operations only if they did not increase my cost at all."

Yet a third agreed with the statement, "I find it necessary for PR reasons to buy recycled materials even though they cost more than I want to pay."

Also, readers indicated that they're eager for their suppliers to share some of the environmental responsibility. Eighty-four percent agreed with the statement, "I expect my suppliers to ship their products to me in environmentally friendly containers." In addition, more than 42% said that they expected their suppliers to take back their containers after use.

DON'T BOOST MY COSTS

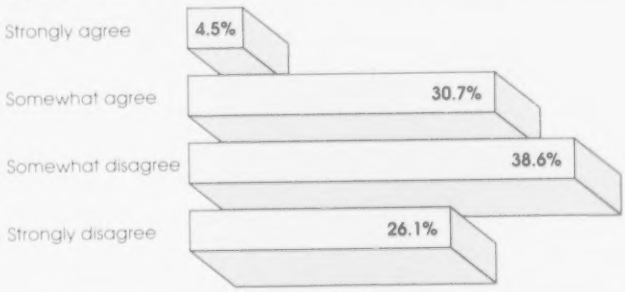
Slightly over half of those polled agreed with the statement "I would be willing to use recyclable materials only if they did not increase my cost at all."




Source: Cahners Publishing Co.

BUYING RECYCLED: POLITICALLY CORRECT?

One-third of respondents said they either somewhat or strongly agreed with the statement "I find it neccessary for pr reasons to buy recycled materials, even though they cost more than I want to pay."




Source: Cahners Publishing Co.

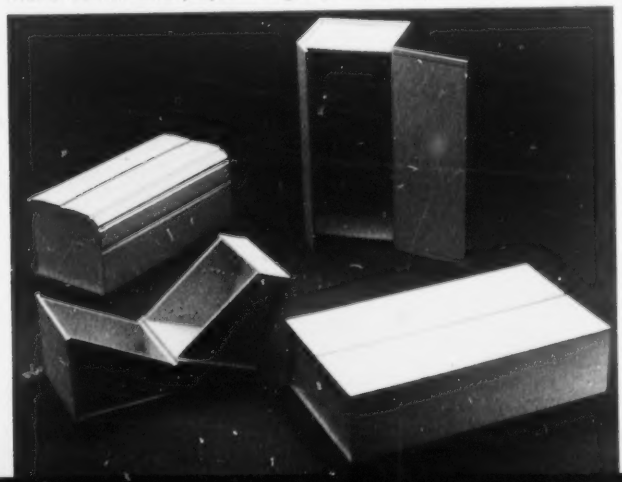
## Paper Scrap Becomes Giftable

The U.S. representative of an innovative Japanese company has devised a process for converting unwaxed kraft scrap into attractive, upscale-looking gift packaging.

PAX USA Inc., representing PAX Co. Ltd. of Japan, uses kraft trim left over from milk carton converting to make a stiff cream or ivory colored board for promotional and gift packaging. Revlon, Neutrogena, Christian Dior, Estee Lauder and Crabtree & Evelyn are some of the cosmetic and fragrance companies that have used packaging made by PAX.

The company also specializes in wood and fiberboard packaging, and has introduced gift packaging made from waste fax and thermal paper. For more information, circle **241**.

**Papermaker** uses kraft trim from milk carton production to make decorative paper for gift packaging.



## Photo Waste To Generate Megapounds Of Scrap Plastic

Can't find enough scrap HDPE and PS for your recycled-content products? Kodak is riding to the rescue.

The company says its new program for collecting plastic discs, cartridges, canisters, lids and spools from film processing labs will generate millions of pounds of reprocessed PS and HDPE starting this spring. Products collected will also include Kodak single-use cameras.

The film waste does not have to come from Kodak products, so all photo labs in the U.S. are eligible to participate.

"Individual labs have often found it difficult to locate recyclers," says Robert F. Bell, manager of environmental programs for Kodak's Consumer Imaging organization. "The film container recycling program makes regional recycling centers available to every lab and simplifies the effort for retailers and finishers."

Recyclers selected by Kodak in the East, Midwest and West will process the waste, cleaning and separating the plastics by resin and then grinding and pelletizing them to buyers' specifications. Recyclers will establish their own markets for the reclaimed materials.

It's estimated that the Kodak program will keep 10 million pounds of plastic and steel out of landfills each year. It also will reduce photofinishers' tipping fees and transportation costs associated with disposal.

"Every bit of solid waste we can keep from landfills will help . . . preserve our environment," says Bell. "The Kodak film container recycling program is an important step."

"Individual labs have often found it difficult to locate recyclers."

# WILL AMERICA SETTLE FOR LESS PACKAGING?

## We don't think so. Consumers criticize wastefulness but don't change their buying habits.

**Greg Erickson**
Editor in Chief

Nobody likes to have anything he does called redundant. But that's exactly the term a reporter for *The New York Times* used recently to describe some forms of packaging.

Redundant packaging, he said, includes "perfume bottles . . . that are in turn covered in plastic wrapping; single-serving foods that produce far more waste packaging per ounce of edibles than larger-sized servings, and compact disks sold in packages ten times the volume of the disk itself."

The *Times* piece mentioned one scheme for legislating trash reduction as it applies to packaging. "It would mandate," said the reporter, "that no more than a certain percentage of the total volume of an item [be] package rather than the product itself."

Understandably, that frightens many product manufacturers—especially those in foods and pharmaceuticals. Restrictions imposed so as to lower the volume of discarded packaging could inadvertently raise the volume of discarded product.

Yet several influential product marketers—mostly from outside the foods and pharmaceuticals industries—are cutting back on packaging without being ordered to do so by government and are reaping measurable benefits.

- The music industry recently announced plans to phase out the much maligned paperboard "longbox" for compact discs.
- Paperboard cartons used by marketers of personal-care products are being eliminated or redesigned for increased efficiency. (See New Packages this issue.)
- Sears, Roebuck recently made headlines with its source-reduction goals, saying it would work with its suppliers to cut packaging overall by 25% between now and 1994.

Do American consumers really want a lot less packaging? Will they vote with their pocketbook against unrestrained packaging "redundancy"?

To find out, we included a number of questions about packaging's environmental impact in our exclusive 1992 Consumer Survey. Working with National Family Opinion, a highly respected consumer-research organization, PACKAGING mailed questionnaires to a demographically accurate sample group of 1,000 consumers nationwide. More then 750 recipients responded with answers to three dozen questions.

This, our 8th annual survey, revealed an intriguing evolution in attitude.

### Still a bad guy

Asked whether their level of concern about trash had gone up this year compared with last year, nearly half of our respondents said yes. Only 3% said they were less concerned.

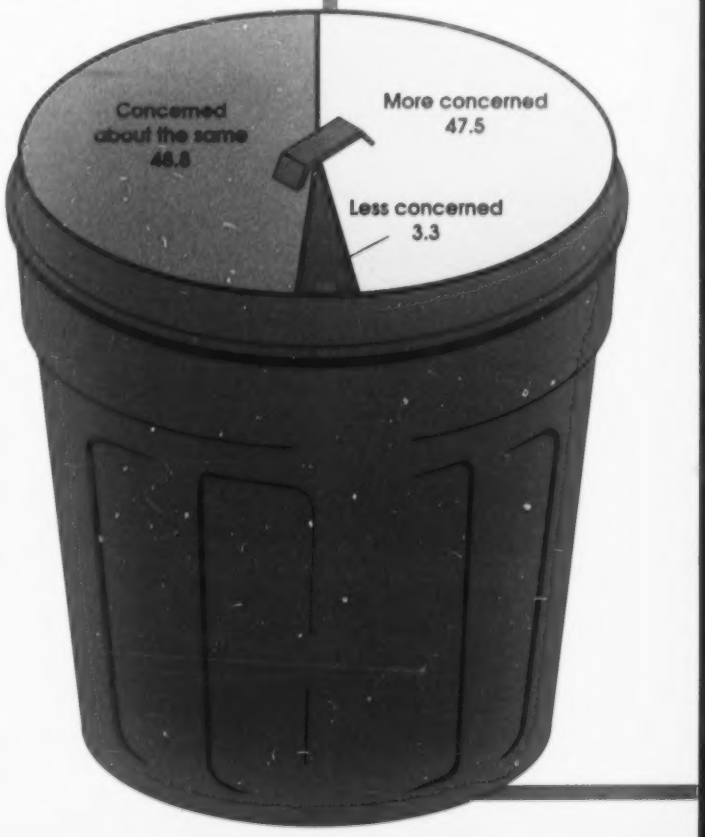
Do consumers still think of packaging an as environmental bad guy? Yes, but not quite as bad. Asked how much of the trash they discarded was made up of packaging, consumers reported an increasingly realistic view: The percentage of respondents saying less than half rose; the percentage saying more than half fell. The key word in that question might be "discard," since the consumer might not define "discarding" as putting things in a recycling bin.

### CONCERN ABOUT THE TRASH PROBLEM CONTINUES TO INCREASE

**Question:** How do you feel about the trash problem this year compared with last year?

There's been little decrease in the consumer's concern about the trash problem 1991-1992, despite accomplishments in recycling.

(Percent respondents)

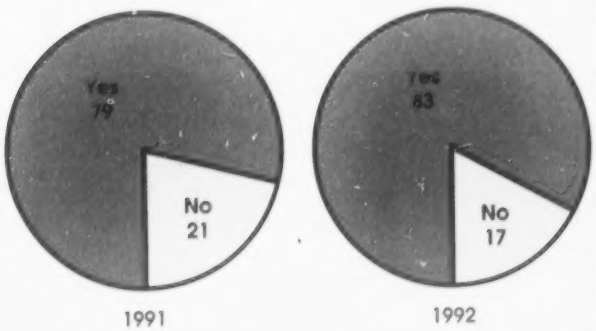


# 8th ANNUAL CONSUMER SURVEY PART 1

## CONSUMERS SEE OVERPACKAGING ON THE RISE...

**Question:** Do you think some products use too much packaging?

(Percent respondents)

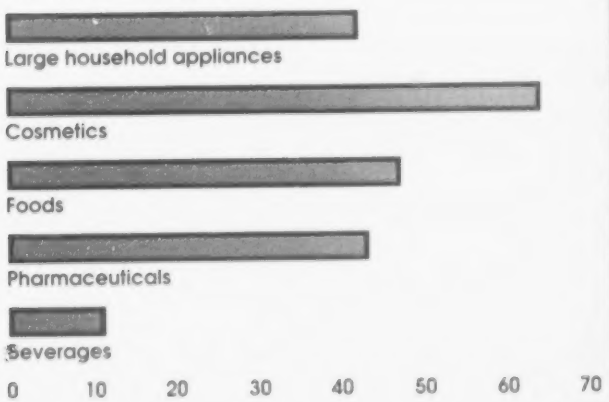



## ...AND SEE COSMETICS AS THE BIGGEST CULPRIT

**Question:** Which products do you think use too much packaging?

**Base:** Percent saying they think some products are overpackaged.

By far, cosmetics are the products most often cited by consumers as examples of overpackaging. From 1991 to 1992, consumers also saw a big jump in overpackaging in the pharmaceuticals segment.

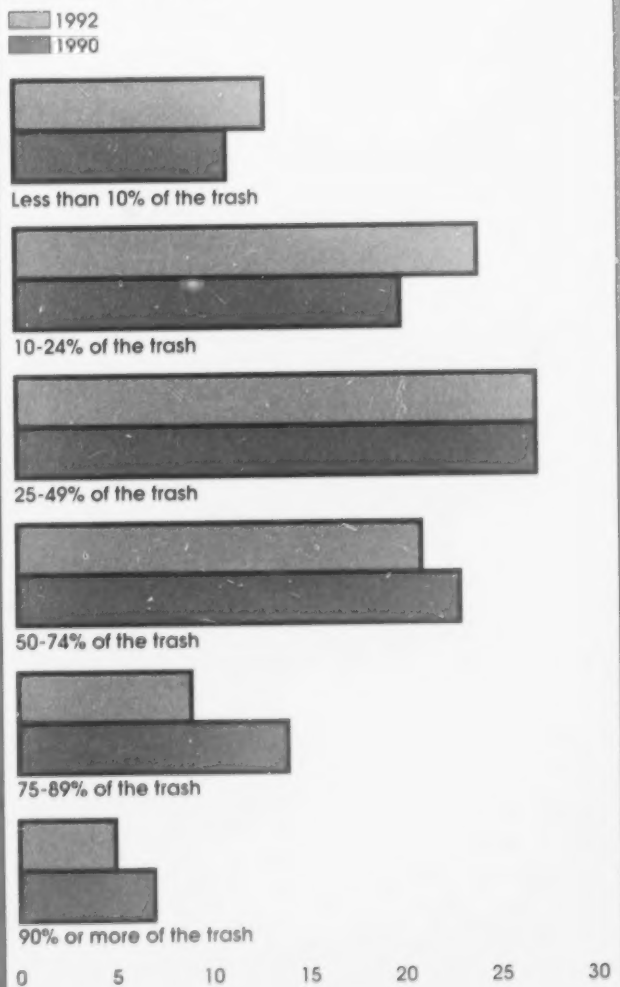



## ESTIMATE OF PACKAGING IN TRASH MOVES CLOSER TO REALITY

**Question:** How much of the trash you discard is made up of packaging?

Between 1990 and 1992, the consumer's estimate of the packaging component of trash has taken a turn for the realistic – and better.

(Percent respondents)



Overpackaging is a growing problem, according to consumers. Last year, 79% of our respondents answered yes to the question, "Do you think some products use too much packaging?" The percentage anwering yes went up by more than four points this year.

Of the respondents who said they believed some products were overpackaged, "household appliances," were cited by more than half of our respondents in 1991 but less than half this year.

Results for the foods category remained unchanged year to year, but the percentage of respondents saying they felt pharmaceticals were overpackaged jumped a surprising 10 points 1991-1992.

The biggest change affects the cosmetics industry: Fully 64% of our respondents called cosmetics overpackaged this year, up 13 points from 1991.

**9% of our respondents called environmenal claims on labels "dishonest."**

**COMING IN JUNE:**
**CONSUMER SURVEY PART TWO**

In June PACKAGING will publish additional results from its exclusive 1992 Consumer Survey.

We'll discuss changing attitudes on a wide range of packaging topics including the sales potential of single-serve food containers, demand for convenience in pharmaceuticals containers . . . and even whether more Republicans than Democrats like their beer in aluminum cans.

In addition to the June article, copies of the complete tabulations—more than 300 pages' worth—will be available for purchase.

For more information, contact:
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P.O. Box 5080
Des Plaines, IL 60017-5080

### Hitting a plateau

Clearly, consumers can help solve the trash problem by making less trash, thereby easing the burden on landfills, incinerators . . . and recycling centers. They've surely heard that from every direction. And they know—or *think* they know—overpackaging when they see it. So are they changing their buying habits? In a word, no.

Consumers told us they were no more willing this year than last to reject overpackaged products as a means of reducing packaging waste. Nor were they more willing this year than last to buy "recyclable" packages.

The chart showing how often the recyclability of a package influences purchase decisions reveals a plateau. What accounts for this? Perhaps it's the prevalence of recycling: Consumers may have begun to think of everything as recyclable, so a search for recyclable containers is not necessary. Perhaps it was the recession—a time when consumers were more worried about being able to afford a product purchase than the trash that might result. (Our survey was conducted last January, when things looked worse economically than they do now.)

The never-ending quest for top convenience may be significant, too. To make recycling work, a consumer has to stay abreast of local government recycling requirements, examine specific packages with an eye toward their relative recyclability . . . and then go to the trouble of actually recycling them. This is not convenient.

What *is* perceived as being particularly convenient, a good buy and, maybe, good for the environment is the concentrate. As Procter & Gamble among others has discovered, downsized cartons of concentrated powders and miniaturized bottles of concentrated liquids attract attention.

Our survey shows that consumer interest in concentrates is growing significantly. Willingness to purchase concentrated products, specifically as a strategy for minimizing waste, jumped a dramatic 11 points 1991-1992.

The consumer may be buying concentrates because they are easy to carry, take up little space in the laundry room or cost less than competitive formulations. But the decision to buy concentrates has some bearing on the "overpackaging" issue also: All other things being equal, the more concentrated a product, the smaller and more responsible-looking its package.

As we've reported, lawmakers and lawyers around the country have publicly attacked as misleading many environmental claims made by products marketers. Respondents to PACKAGING's 1992 Consumer Survey reported similar opinions.

Asked which terms best described environmental information on product labels, nearly 36% of our respondents said "misleading" and "confusing." An even higher percentage said environmental claims were "insufficient." And more than 9% called them downright "dishonest."

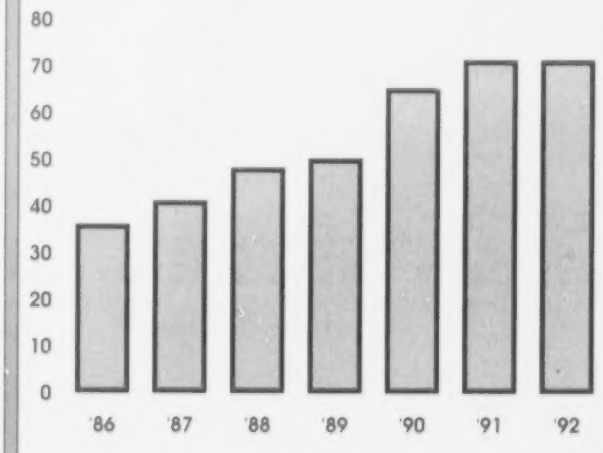
On the other hand, there appears to be nothing misleading, confusing or dishonest about containers that—because of up-to-date designs—conserve packaging material. ■

## IMPORTANCE OF RECYCLABILITY IN PURCHASE DECISIONS LEVELS OFF

**Question:** How often does the recyclability of the package affect your decision to buy one product over another?

**Base:** Percent answering 'Often/Sometimes'

For only the second time since 1986, package recyclability as a factor in product purchase decisions hit a plateau this year.

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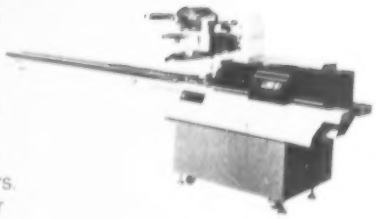

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## PEOPLE

R. Baert

R. Meyer

**Andrew Smith** has been named CEO of Rexene . . . **Rita Bahner** has been named executive director of the Food Processors Institute . . . Seaquist Closures has named **Robert Dealey** director of engineering . . . **Hap Hoover** has been appointed president and general manager of IPC North America . . . **William Avery**, chairman, president and CEO of Crown Cork & Seal has been elected a director of the West Co. . . . International Corrugated Packaging Foundation has elected **J. Richard Troll** as president . . . Weirton Steel has announced the retirement of **Lawrence Isaacs** from its board of directors and the appointment of **David Wang** as successor . . . **R.J. Meyer** has been named president of Packaging Equipment and Materials Co. . . . Arrow Industries has promoted **Steve Rosenberg** to president . . . Eagle Packaging Group has appointed **Raymond Baert** to director of manufacturing . . . H.S. Crocker has named **Steven Campbell** president . . . **Albert Boese** has been appointed vice president and general manager for Alford Industries' consumer packaging and color prelude divisions . . . **H. Ray Looney**, president and CEO of Ball-Incon Glass Packaging, has been elected a group vice president of Ball Corp.


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